Service Improvement and Efficiency Committee

Agenda

Members of the Committee:

Cllr J L Thomas (Chairman)
Cllr P E Bulman
Cllr S J Catchpole
Cllr S M Clancy
Cllr S I Holland
Cllr K S Kelly

Cllr G K Nurden (Vice Chairman)
Cllr I J Mackie
Cllr M L Murrell
Cllr S M Prutton
Cllr D Roper

Cllr J J Emsell (ex officio)

Date:

Wednesday 24 August 2022 at 6pm

Place:

Council Chamber, Thorpe Lodge, 1 Yarmouth Road, Thorpe St Andrew, Norwich

Contact:

Dawn Matthews tel (01603) 430404 Email: dawn.matthews@southnorfolkandbroadland.gov.uk
Website: www.southnorfolkandbroadland.gov.uk

PUBLIC ATTENDANCE:

If a member of the public would like to attend to speak on an agenda item, please email your request to committee.bdc@southnorfolkandbroadland.gov.uk, no later than 5.00pm on Friday 19 August 2022.

Large print version can be made available

If you have any special requirements in order to attend this meeting, please let us know in advance.

AGENDA

1.   **To receive declarations of interest under Procedural Rule no 8**   (page 3)

2.   **Apologies for absence**

3.   **Minutes of the meeting held on 17 May 2022**   (minutes attached – page 5)

4.   **Collaboration Working Group**   (report attached - page 13)

5.   **Using intelligence to achieve a First-Class Customer Service**
                                                                           (report attached – page 27)

6.   **Exclusion of the Press and Public**

     The Chairman will move that the press and public be excluded from the meeting for
     the remaining items of business because otherwise, information which is exempt
     information by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local
     Government Act 1972, as amended by The Local Government (Access to
     Information) (Variation) Order 2006, would be disclosed to them.

7.   **Options on Provision of a Future Fraud Service**   (report attached - page 38)
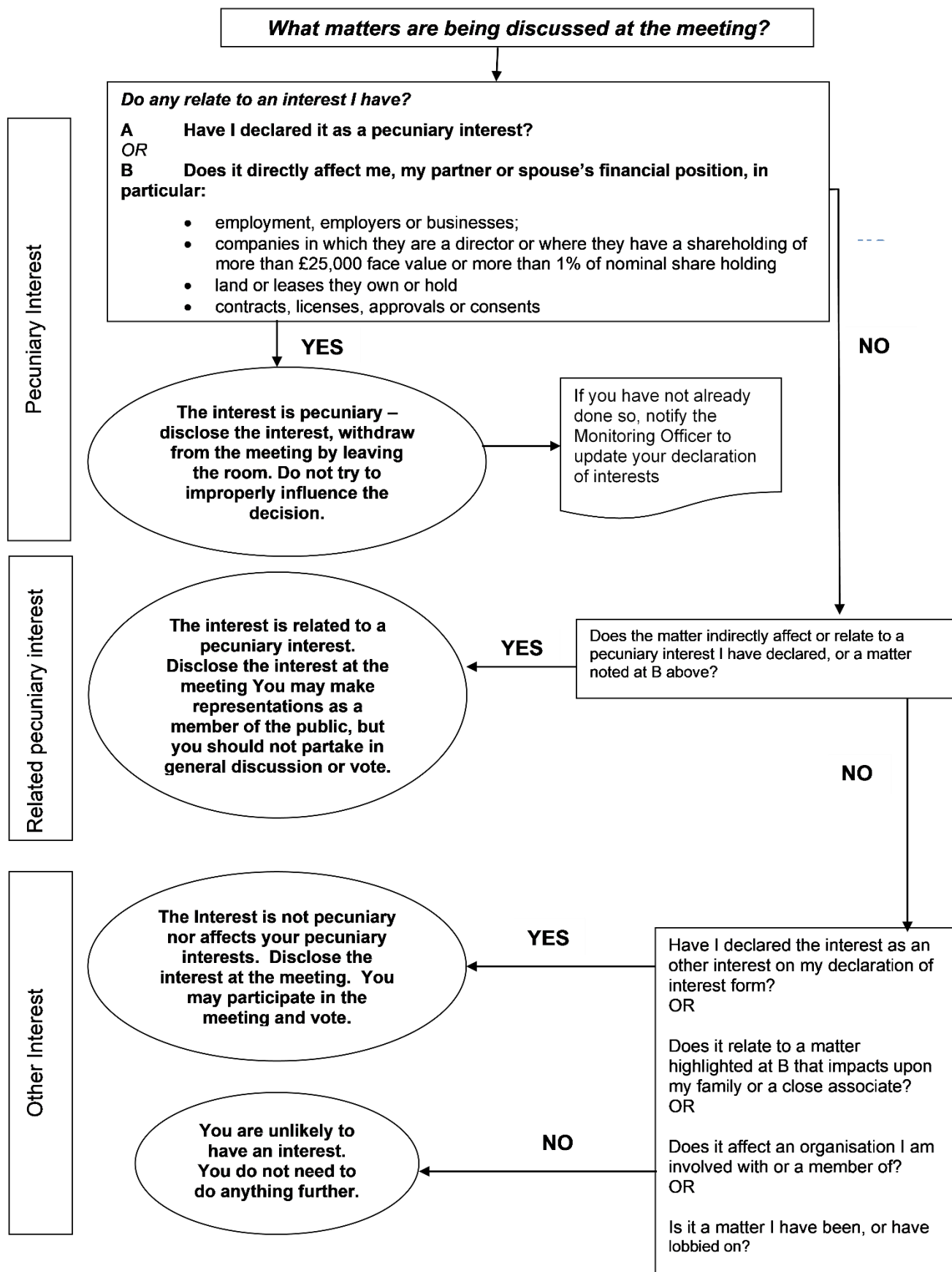
DECLARATIONS OF INTEREST AT MEETINGS

When declaring an interest at a meeting Members are asked to indicate whether their interest in the matter is pecuniary, or if the matter relates to, or affects a pecuniary interest they have, or if it is another type of interest. Members are required to identify the nature of the interest and the agenda item to which it relates. In the case of other interests, the member may speak and vote. If it is a pecuniary interest, the member must withdraw from the meeting when it is discussed. If it affects or relates to a pecuniary interest the member has, they have the right to make representations to the meeting as a member of the public but must then withdraw from the meeting. Members are also requested when appropriate to make any declarations under the Code of Practice on Planning and Judicial matters.

Have you declared the interest in the register of interests as a pecuniary interest? If Yes, you will need to withdraw from the room when it is discussed.

Does the interest directly:
   1. affect yours, or your spouse / partner's financial position?
   2. relate to the determining of any approval, consent, licence, permission or registration in relation to you or your spouse / partner?
   3. Relate to a contract you, or your spouse / partner have with the Council
   4. Affect land you or your spouse / partner own
   5. Affect a company that you or your partner own, or have a shareholding in
 	
If the answer is "yes" to any of the above, it is likely to be pecuniary.
 	
Please refer to the guidance given on declaring pecuniary interests in the register of interest forms. If you have a pecuniary interest, you will need to inform the meeting and then withdraw from the room when it is discussed. If it has not been previously declared, you will also need to notify the Monitoring Officer within 28 days.

Does the interest indirectly affect or relate any pecuniary interest you have already declared, or an interest you have identified at 1-5 above? If yes, you need to inform the meeting. When it is discussed, you will have the right to make representations to the meeting as a member of the public, but you should not partake in general discussion or vote.
Is the interest not related to any of the above? If so, it is likely to be an other interest. You will need to declare the interest, but may participate in discussion and voting on the item.
Have you made any statements or undertaken any actions that would indicate that you have a closed mind on a matter under discussion? If so, you may be predetermined on the issue; you will need to inform the meeting, and when it is discussed, you will have the right to make representations to the meeting as a member of the public, but must then withdraw from the meeting.

FOR GUIDANCE REFER TO THE FLOWCHART OVERLEAF.
PLEASE REFER ANY QUERIES TO THE MONITORING OFFICER IN THE FIRST INSTANCE

DECLARING INTERESTS FLOWCHART – QUESTIONS TO ASK YOURSELF

What matters are being discussed at the meeting?

Pecuniary Interest

Do any relate to an interest I have?

A Have I declared it as a pecuniary interest?

OR

B Does it directly affect me, my partner or spouse's financial position, in particular:

- employment, employers or businesses;
- companies in which they are a director or where they have a shareholding of more than £25,000 face value or more than 1% of nominal share holding
- land or leases they own or hold
- contracts, licenses, approvals or consents

YES

The interest is pecuniary – disclose the interest, withdraw from the meeting by leaving the room. Do not try to improperly influence the decision.

If you have not already done so, notify the Monitoring Officer to update your declaration of interests

NO

Related pecuniary interest

The interest is related to a pecuniary interest. Disclose the interest at the meeting You may make representations as a member of the public, but you should not partake in general discussion or vote.

YES

Does the matter indirectly affect or relate to a pecuniary interest I have declared, or a matter noted at B above?

NO

Other Interest

The Interest is not pecuniary nor affects your pecuniary interests. Disclose the interest at the meeting. You may participate in the meeting and vote.

YES

Have I declared the interest as an other interest on my declaration of interest form?
OR

Does it relate to a matter highlighted at B that impacts upon my family or a close associate?
OR

Does it affect an organisation I am involved with or a member of?
OR

Is it a matter I have been, or have lobbied on?

You are unlikely to have an interest. You do not need to do anything further.

NO

SERVICE IMPROVEMENT AND EFFICIENCY COMMITTEE

Minutes of a meeting of the Service Improvement and Efficiency Committee of Broadland District Council, held on Tuesday 17 May 2022 at 6pm at Thorpe Lodge, 1 Yarmouth Road, Thorpe St Andrew, Norwich.

Committee Members Present:	Councillors: J Thomas (Chairman), S Catchpole, K Kelly, G Nurden, I Mackie, M Murrell, S Prutton and D Roper.
Apologies for Absence:	Councillor: P Bulman, S Clancy and S Holland.
Substitutes:	Councillor: K Leggett (for P Bulman) and S Beadle (for S Holland)
Cabinet Members Present:	Councillors: J Emsell and J Leggett
Other Members Present:	Councillors: S Riley
Officers in Attendance:	The Director of Resources, the Assistant Director for Regulatory Services, Assistant Director for Planning, the Development Manager, the Customer Experience and Insight Lead, the Food, Safety and Licensing Manager, and the Democratic Services Officer (JK).

65   DECLARATIONS OF INTEREST

No declarations of interest were made.

66   APOLOGIES FOR ABSENCE

Apologies for absence were received from Cllrs P Bulman, S Clancy and S Holland.

67   MINUTES

The minutes of the meeting held on 26 April 2022 were agreed as a correct record and signed by the Chairman.

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17 May 2022

68   SPARK TRANSFORMATION PROGRAMME UPDATE

The Director of Resources introduced the report which provided the Committee with an update on the major projects that were being progressed as part of the SPARK Transformation Programme. A short update was given on each live project and members' attention was drawn to the significant progress made on establishing the One Team serving the two councils.

The Chairman thanked officers for their report and asked members for their comments on the report. A member raised the issue of the joint emails and that it still referred to "my new email address" and the Director of Resources agreed to ensure the standard wording was updated to remove this.

In response to a question on whether any projects would be affected because of the move to the new Horizon building, officers confirmed that all projects should be able to be progressed regardless of the move and there should be no impact on cost or resource or timing.

A query was raised as to the new proposed CRM and whether the Digital Mail Solution project was part of that. Officers clarified that the Digital Mail Solution project was concerned with mailing only. At present an electronic process was used for all major mailings, such as council tax bills which saved significant costs and this project was looking at possibly utilising this approach for all our mail. It was clarified that this was separate to the CRM, which was a separate project and would be presented to members shortly.

In response to a question on whether the budget had already been set to cover any costs around moving to the Horizon building and all other projects in the forward plan, it was confirmed the budget for all current projects was previously agreed and at the Full Council meeting, and all the necessary budget had been agreed and set aside for the move to the Horizon building.

Discussion continued around the Horizon building and the project oversight by members and the Committee was reassured that although it was still early days, governance was part of the process and how members could engage with and have oversight of the project would be picked up as part of Phase Three and as part of SPARK. Officers would also continue to report back to this Committee on this project.

A member asked who the Project Manager would be, and the Director of Resources confirmed the Transformation and Innovation Manager, Emma Pepper would be in overall charge and responsible for ensuring all the different strands of the project were pulled together into one overall programme with a range of projects underneath such as IT, facilities and HR.

AGREED

To note the content of the report with regard to the progress made with the programme.

69   **BROADLAND AND SOUTH NORFOLK CUSTOMER PANEL**

The Director of Resources introduced the report which provided an update on the progress made towards the creation of a customer panel, following a commitment made by the Council's Cabinet.

The Customer Experience and Insight Lead advised that engagement and feedback with stakeholders was key and was why the creation of a customer panel had been agreed. It was proposed that the panel would be used in a variety of ways, for example surveys, focus groups, user testing groups, customer journey mapping, snap polls and consultations. The suggestion was that they would meet four times a year to ensure regular feedback but would not over burden the panel members. She went on to reassure members that the costs would be minimal and were already accounted for in the marketing budget.

In response to a query from a member, officers confirmed the panel would be representative of the population and demographics of the district and it would include representatives from businesses and organisations, as well as residents. The panel would be filtered as needed, so for example only panel members who had interacted with the planning area would be surveyed on the planning service, whereas the whole panel would be used, for example if the Council wanted to explore how accessible its offices were.

Officers confirmed the panel members would be volunteers, however there were some hard to reach groups, for example Gypsy and Travellers, and a specific approach might be needed to get representatives from these groups. One member advised that Norfolk County Council had a specific team to liaise with Gypsy and Travellers and suggested contacting them.

Reference was made to the possibility of adding an instant quick survey to all emails sent, with an automatic email being sent asking the customer to rate their experience from their contact with the Council, with maybe five ratings from excellent to poor, which removed the need for people to move to another part of the website to give their feedback. Officers confirmed this was an option that would be considered, but that this was just one of the tools that could be used, for example lessons learned from complaints, the customer satisfaction survey on the website, and the rolling out of the survey via phone contact.

Several concerns were raised by members regarding the next stage, and it was stressed that the data collected needed to be visible and accessible to members and officers. Officers advised that information would be

reported to Cabinet on the quarterly outturns and that the differentiation between South Norfolk and Broadland would be clear, as all respondents would need to declare the village or town they lived in.

In response to a concern around branding and the Director of Resources confirmed that everything would be under the brand of One Team, Two Councils.

A number of members raised the issue of ensuring the significant section of the community with no internet access were fully included. Officers confirmed this was an issue that was being addressed, in a number of ways, for example, officers were planning to use parish magazines and Broadland News, adverts in doctors' surgeries, provide reply paid envelopes, Older People's Partnership, libraries and other such places.

The conversation turned to the issue of how members could be sure this approach was a success and the Customer Experience and Insight Lead advised members she was hoping to come back within a year with the results, however it would take a while to get the panel set up and several surveys done. The Director of Resources confirmed that this would not show quick results, but there were two distinct stages; getting the panel set up and keen to engage, and then secondly ensuring the results were fed back to services to have a positive impact. She also agreed to add the project to the SPARK programme.

On a show of hands, members unanimously

 AGREED

1. To note the creation of a Customer Panel as agreed in the Moving Towards a First Class Customer Service Strategy.

2. To note the planned external communication plan.

70   **LICENSING SERVICES – SERVICE ENHANCEMENT OPTIONS**

The Assistant Director of Regulatory Services introduced the report which outlined the options for the introduction of paid for licensing related advice and support to businesses. Support and advice were currently offered to businesses, mainly via the new Business Regulatory Support Hub which offered free advice by way of a low cost phone number, and covered the range of Regulatory Services as well as advice on economic development for example grants.

The overarching duty of the Council was to promote public safety with the aim of providing advice to achieve compliance by education rather than enforcement. The current free advice was mainly generalist and in future, the Council would be looking to provide more specialised advice, specific to the business. The Assistant Director of Regulatory Services advised

members the team provided excellent service and regularly received good feedback from businesses.

The Assistant Director of Regulatory Services drew members' attention to the proposed deletion of recommendation three in both this report and the following report as the setting of fees would need to be approved at Full Council and could not be delegated to officers.

The proposed change in advice supported the Commercialisation Strategy by supporting the whole range of businesses in the district to grow. This proposal, if agreed by members, would deliver the concept of commercialising licensing services as agreed in the Delivery Plan.

The Food, Safety and Licensing Manager reminded members that the availability of free advice would not be eroded; this was a way to provide value added services that businesses might wish to pay for. All the fees would be reinvested in the service to support the regulatory function. The costs should be lower than other providers as no profit would be made, and the Council had the unique selling point in that it was the regulator.

The Food, Safety and Licensing Manager then went on to outline the types of advice that were proposed to be made available.

In response to a query from a member about whether all advice should be free, officers explained that this was an improved offer alongside the free advice and that only if really bespoke advice was needed on specific issues, would a charge be made. This type of enhanced service could not be provided at present, without an increase in the team resource and consequent cost to all tax payers.

Reference was made by a member on a possible impact on current service delivery and members were advised that the impact of the charged advice should have a positive impact, as it would be cost neutral and also should reduce enforcement, as for example the bespoke advice could result in a higher hygiene rating, and thus less inspections and the public would be more protected.

The conversation turned to the projected level of income and officers explained that the proposed pilot scheme would provide a good indication of this. The pilot results would be brought back to members with a report outlining what had gone well with the pilot and reliable income projections and that would also provide data to determine whether additional resources might be needed to satisfy the demand.

During further discussion, one member asked if South Norfolk Council was currently charging and it was confirmed that apart from a chargeable half hour service provided to taxi drivers, no other services were currently charged for.

Following a concern raised over start-up businesses and possibly refunding the costs for them, officers explained that the costs involved in charging and then refunding would be prohibitive.

The Chairman thanked officers for their report and following a show of hands it was unanimously:

RECOMMENDED TO CABINET

1. To authorise the piloting of enhancements to Licensing services in 2022/23 and the mainstreaming of successful service enhancements in 2023/24, at full cost recovery.

2. To agree the reinvestment of income generated from service enhancements to licensing activity into the Council's regulatory licensing service, so as not to impact on regulatory service capacity.

71   FOOD SAFETY SERVICES – SERVICE ENHANCEMENT OPTIONS

The Food, Safety and Licensing Manager introduced the report which was effectively a mirror of the licencing report members had discussed, however, this report related specifically to food safety.

One member raised the issue of a possible conflict of interest between giving advice and also having to undertake enforcement and officers were clear that the enforcement would always override the paid advice, so for example a potentially unsafe food business would always be dealt with under enforcement to ensure public safety.

The Food, Safety and Licensing Manager advised members that a food business that received a low hygiene score, could choose to immediately implement the recommendations, and pay again for an immediate re-visit and could in fact request and pay for multiple re-visits to receive a better score, thus ensuring public safety in the shortest possible time, whilst increasing income.

After a show of hands, it was unanimously agreed:

RECOMMENDED TO CABINET

1. To authorise the piloting of enhancements to Food Safety services in 2022/23 and the mainstreaming of successful service enhancements in 2023/24, at full cost recovery.

2. Cabinet to agree the reinvestment of income generated from service enhancements to food safety activity into the Council's regulatory food safety service, so as not to impact on regulatory service capacity.

72   PLANNING BUSINESS CASE – APPOINTMENTS TO NEW VACANCIES AND UPDATES TO STRUCTURE

The Assistant Director of Planning introduced the report and outlined the results of the recent full review of the Development Management service which was that more resource was needed to create some additional capacity and to be able to properly deal with large scale developments. The Council had a number of large developments at present and indeed the proposed development at Rackheath was the largest in the entire county and more resource was needed to effectively and properly consult with the parishes, the members and public. In addition, the next iteration of the Local Plan would be coming soon, numbers of all types of planning applications were on the increase, as well as Development Consent Orders, Nutrient Neutrality and many other issues.

The proposal was to create eight new posts, which would be the equivalent of an additional 6.4 FTE at a total extra cost of £146,491 but that would be split between the two councils. Some existing posts would be deleted to assist in the funding of the new posts and the remainder would be funded by the increase in income, for example the initial Rackheath fee for outline permission was £150k.

The key changes would be the creation of a Strategic Growth Team to focus on this key area across the district, and the creation of more capacity to address the workloads and deliver against new workstreams. The Assistant Director of Planning then outlined the specific posts and their proposed remit and responsibilities.

Reference was made by a member to the opportunities for internal promotion which was welcomed, and it was also clarified by officers that the Council could also go out to advert with an attractive offer – the chance to work in a multi skilled team, with the opportunities to work on major developments as well. This meant there would also be continuity on big projects as just obtaining outline permission could take a year.

In response to a query about the additional £100,000 recently agreed for the planning service, the Assistant Director of Planning advised that the additional funds were welcomed but would be used as a one off to prepare for Nutrient Neutrality, rather than directly fund the service.

Members endorsed the approach acknowledging that if the Council wanted strategic developments, it was vital that there was the resource available to deliver them properly and it was noted that it was not just planning fees, council tax income would also be forthcoming.

RECOMMENDED TO CABINET:

1. Cabinet to agree the proposed changes to the Planning Team and the intention to fill the current and new vacancies.

2. Cabinet to agree the use of the additional funding of £45k (£100k in total for both Councils), approved as part of the in-year opportunities report in April, to fund development of mitigation measures to address Nutrient Neutrality and/or other immediate environmental pressures arising from the Environment Act.

73   EXCLUSION OF THE PRESS AND PUBLIC

RESOLVED:
That the press and public be excluded from the meeting because otherwise, information which is exempt information by virtue of Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972, as amended by The Local Government (Access to Information) (Variation) Order 2006, would be disclosed to them.

74   EXEMPT MINUTE OF THE MEETING HELD 26 April 2022

The Committee received and noted the exempt minutes from their meeting on 26 April 2022.

(The meeting concluded at 8.45pm)

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Chairman

Collaboration Working Group

Report Author(s):

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Portfolio:

Transformation and Organisational Development

Ward(s) Affected: All

Purpose of the Report:

This report provides the conclusion to the work undertaken by the Member Working Group that has reviewed the collaboration. The findings are attached in the report of the Portfolio Holder for Transformation and Organisational Development.

SIEC are requested to review the findings and conclusions therein and recommend this onto Cabinet and / or make alternative / additional recommendations as part of their report.

Recommendations:

1. To recommend to Cabinet the content of the report and the recommendations therein.

1.   Summary

1.1   This report provides the conclusion to the work undertaken by the Member Working Group that has reviewed the collaboration. The findings are attached in the report of the Portfolio Holder for Transformation and Organisational Development.

1.2   SIEC are requested to review the findings and conclusions therein and recommend this onto Cabinet and / or make alternative / additional recommendations as part of their report.

2.   Background

2.1   The working group was established by the Portfolio Holder for Transformation and Organisational Development, with membership of the group also being Cllr's Clancy (Chairman), Riley (Vice Chairman), Adams and King. The Portfolio Holder set the terms of reference for the group, which were confirmed at the first meeting of the group.

2.2   The working group was supported by the Chief of Staff (Monitoring Officer), the Managing Director and the respective senior officer leads for each of the areas under consideration.

2.3   The group met frequently between January and May 2022 and considered the outcomes achieved that were due to be delivered as part of the feasibility study, commentary on those activities that have been achieved to date, areas which were work in progress and areas which are yet to be progressed.

2.4   This resulted in the working group confirming the work in progress against the feasibility study and then adding in additional recommendations where appropriate. The areas covered by the group were:

- Governance
- External Communications and Public Affairs
- One Team Culture and Employer of Choice
- Finance and Performance
- Customer Engagement

3.   Current position/findings

3.1   The group have concluded their work and the report of the Portfolio Holder is attached at **Appendix 1** for review by SIEC.

4.   Proposed action

4.1   SIEC is requested to review the report at **Appendix 1** and approve this onto Cabinet with ant necessary amendments or alterations that the committee believes to be appropriate.

5. Issues and risks

5.1 **Resource Implications** – any resource implications from the recommendations within the report are noted in the content.

5.2 **Legal Implications** – the working group was set up in accordance with the constitution.

5.3 **Equality Implications** – not appliable to this report.

5.4 **Environmental Impact** – not applicable to this report.

5.5 **Crime and Disorder** – not applicable to this report.

7. Conclusion

6.1 The Member working group has now concluded its review of the collaboration and the recommendations within this report are designed to continue to take the Council forwards in providing First Class Customer and service delivery.

8. Recommendations

7.1 To recommend to Cabinet the content of the report and the recommendations therein.

Background papers

Member Area – Collaboration Working Group – full set of papers for each area, terms of reference and agendas & minutes.

Report of the Portfolio Holder - Collaboration Working Group

Purpose of the Report:

This report concludes on the work of the Collaboration Working Group and provides the final report to be considered by the Service Improvement and Efficiency Committee.

Terms of Reference (TOR)

The TOR of the group was defined by the Portfolio Holder Transformation and Organisational Development, this was reviewed by the Group at the first meeting with some amendments agreed and can be found at **Appendix A** to this report.

Membership of the Group

Cllr Jonathan Emsell – Portfolio Holder

Cllr Stuart Clancy – Chairman

Cllr Steve Riley – Vice Chairman

Cllr Tony Adams

Cllr David King

Officer support to the Member Working Group

The working group was supported by the Chief of Staff (Monitoring Officer), the Managing Director and the respective lead officers for each area under consideration.

Areas of review

- Governance
- External Communications and Public Affairs
- One Team Culture and Employer of Choice
- Finance and Performance
- Customer Engagement

Format of the meetings

The working group were provided with a presentation on each area, this looked at the outcomes that were due to be delivered as part of the feasibility study, commentary on

those activities that have been achieved to date, areas which were work in progress and areas which are yet to be progressed.

This resulted in the working group confirming the work in progress against the feasibility study and then adding in additional recommendations where appropriate.

At each subsequent meeting a concluding report on the area was presented to the working group, agreed and finalised.

The reports form part of the background papers to this report, with this report providing a summary of the work already in progress and the recommendations, these are now to be presented to the Service Improvement and Efficiency Committee for progress.

Governance

The strategic ambition for governance was the first area of review for the group with a presentation provided on progress against the key action points, it was clear that the action had been completed in the following key areas:

- Meeting cycles aligned where possible
- Report templates aligned
- Member induction training aligned, where possible

In addition to the above the working group also reviewed the updates to the constitution that had been approved by Council to date and were pleased to note the amount of traction in this area that had already been achieved. The group also reviewed areas of commonality that was already evident between the Broadland constitution and that in place at South Norfolk.

There were areas whereby work was still in progress and the group were keen to look at this and provide endorsement, and where necessary add in additional recommendations for consideration by SIEC.

The main areas of focus for the group were:

- Constitutional review to align with best practice where possible whilst being cognisant of sovereignty - this included:
    - Delegations
    - Committee decision making process and conflicts between Overview and Scrutiny and Policy Development Panels
    - Portfolio Holder responsibilities
    - Irregularities including quorum, terms of reference, substitution, definition of key decisions, forward plan and meeting procedure rules
- Member training
- Joint forums and meetings

The conclusion to the review of this area was as follows:

Action	Commentary
Officers to work with Portfolio Holders to review current delegations to ensure that they are clear, concise and practical. This work to include comparison with South Norfolk Council and best practice examples	Work in progress - Delivery Plan 2022-24 – reference MT15

Review Portfolio Holder and management structure responsibilities (including South Norfolk) with a view to simplification and alignment	Work in progress - Delivery Plan 2022-24 – reference MT15
Review of constitution to ensure that the terms of reference for all committees and panels are contained in part 4 – rules of procedure	Work in progress - Delivery Plan 2022-24 – reference MT15
All references to quorum are referred to as part of the terms of reference for all committees and panels	Work in progress - Delivery Plan 2022-24 – reference MT15
Review the scheme of substitution	Work in progress - Delivery Plan 2022-24 – reference MT15
Review of the definition of key decision	Work in progress - Delivery Plan 2022-24 – reference MT15
Update the forward plan references in line with legislation	Work in progress - Delivery Plan 2022-24 – reference MT15
Update the council procedure rules to ensure they are clear and consistent	Work in progress - Delivery Plan 2022-24 – reference MT15
Review and explore the possibilities of joint committee meetings and how these can complement the sovereign decision making of each council	Work in progress - Delivery Plan 2022-24 – reference MT15
The role and responsibilities of the Overview and Scrutiny, Panels, Working Groups and Time & Task Panels to be reviewed to; remove duplication, clarify terms of reference and streamline & simplify decision making process	**Recommendation 1**
A member working group is established to input and oversee the constitutional amendments referred to in this paper	**Recommendation 2**
Extra resource will need to be provided to enable dedicated officer time is provided to enable this review to gain necessary traction and implement the proposals within the timelines identified	**Recommendation 3** **Note national graduate secured for six-month placement**
To endorse the approach being taken by the Member Development Panel in relation to a full training plan for the next four-year term of office	**Recommendation 4**
To endorse the view of the Member Development Panel that a fully time post should be provided to enable the Council to achieve Member Charter status	**Recommendation 5**

Review of the terms of reference of joint scrutiny and what can be learnt from practice elsewhere, to determine the future viability of this committee	**Recommendation 6**

External Communications and Public Affairs

The strategic ambition for marketing and communications was to transform the way we work; it was clear that the action had been completed in the following key areas:

- Internal intranet pages launched "connect"
- Comms campaign implemented on one team working
- Internal comms style and guides created

The area whereby work was still in progress, which the group were keen to look at and provide endorsement, and where necessary add in additional recommendations for consideration by SIEC was:

- External comms
- Public affairs approach and plan

The conclusion to the review of this area was as follows:

Action	Commentary
Explore opportunities to make Connect more accessible to staff	Work in progress - Delivery Plan 2022-24 C1
Review internal comms style guide with accessibility in mind	Work in progress - Delivery Plan 2022-24 C1
Continue to promote the One Awards internally and externally	Work in progress - Delivery Plan 2022-24 C3
Deliver a values campaign including a "connect takeover"	Work in progress - Delivery Plan 2022-24 C1
Create simple and digestible narratives around the success of the One Team for staff to digest and to enable them to become ambassadors for the One Team	Work in progress - Delivery Plan 2022-24 C1
Communicate the delivery of large-scale transformation projects and reinvigorate the SPARK communications and highlight the crucial role these projects play in our ongoing internal collaboration journey	Already in train in relation to all SPARK projects
Create core messages and narratives that support the key objectives and vision of the Councils. These narratives will be used within internal communications, so our staff become our Councils most passionate ambassadors	Work in progress - Delivery Plan 2022-24 C1
Build effective comms channels by growing our reach and engagement	Work in progress - Delivery Plan 2022-24 C4 and C5

through existing channels to target new demographics and hard to reach groups	
Build trust by relying to comments on our social media channels. Increase two-way communication between the Councils and their residents	Work in progress - Delivery Plan 2022-24 C4 and C5
Benchmark and monitor by conducting regular pulse surveys and polls to understand residents' priorities and benchmark their awareness of key council objectives to track how awareness is growing	Work in progress - Delivery Plan 2022-24 C4 and C5
Review opportunities for joint comms channels which will enable a stronger voice for both Councils	Work in progress - Delivery Plan 2022-24 C4 and C5
Approve the initial steps for public affairs, recognising work needs to be done to ascertain resourcing (*)	Work in progress - Delivery Plan 2022-24 C4 and C5
Build trust by delivering good customer service and doing what we say we will do. This needs to be a key message for all staff to ensure that the customer is at the forefront of everything that we do, enable good reputation, trust, and positive brand.	**Recommendation 7**

(*)

1. review internal resources available within the communications team and strategy team to ensure we have resource to progress public affairs further

2. develop a strategic public affairs plan for the wider organisation, based on the strategic priorities and issues which the two councils would wish to present a united public profile, including:

- key messages to underpin our public affairs work

- understanding what our 'asks and offer' is, including the key policy positions

3. work with CMLT and managers to identify initial focus areas where a public affairs strategy may be used to deliver better outcomes for the districts

One Team Culture and Employer of Choice

The strategic ambition for this area was to enable a joint officer team, it was clear that the action had been completed in the following key areas:

- MD appointed
- Senior management team structure in place & appointed to
- One joint team – effective from January 2020 with common terms & conditions
- All employee related policies & procedures aligned and approved by staff representatives and trade union representatives
- Joint values and behaviours

The area whereby work was still in progress is establishing the principles for becoming an employer of choice. It was recognised by the working group that there are now national issues that will impact on the One Team and this ambition but were encouraged by the amount of work that had been achieved to date, enabling the culture of the One Team to develop organically.

The employer of choice approach has five areas of focus:

1. Our People, Our Approach
2. Performance Lifecycle
3. Strategic projects
4. Development of management cohorts
5. Wellbeing

The working group reviewed the work in these areas and concluded as follows:

Action	Commentary
The alignment of the remaining employee related policies to be complete by summer 2022	In progress through the Staff Consultation Forum, working with staff representatives and UNISON representatives
Pursue all the innovative suggestions as outlined in the body of the report (*) to expand our traditional job market	Work in progress - Delivery Plan 2022-24 B4
Continue with the formal coaching training, ensure this is utilised for council staff and embed a coaching culture throughout all teams	Work in progress - Delivery Plan 2022-24 B4
Progress the move to Oracle HR & Payroll system and continue with the work underway for effective transition between systems	SPARK project – IT system transformation
Ensure the two career paths are utilised – management and technical to ensure all staff promoted to line managers possess the necessary skills	Work in progress - Delivery Plan 2022-24 B4 and B5
Develop and implement the talent management strategy	Work in progress - Delivery Plan 2022-24 B4
HR Business Partners to continue to support managers in the recruitment skills to ensure that best staff are appointed to	Work in progress - Delivery Plan 2022-24 B4
Members to consider if a pre-recorded "meet and greet" session with new staff to explain the members roles and the political environment might be helpful	**Recommendation 8**
Members view to be sought in developing and agreeing a new approach to flexible / hybrid working	**Recommendation 9**
In preparation for the One Team recruitment policy roll out, it would be helpful if members wished to expand on	**Recommendation 10**

how we have described the One Team as an Employer of Choice	

(*) – Norfolk wide apprenticeship scheme, care leavers, diversity & inclusion, mental health & wellbeing, internal skill development, armed forces, ex-prisoners, new approach to onboarding (engage, enable, empower).

Finance and Performance

The group received a presentation regarding finance and performance at one of the meetings and the areas of focus were:

- Summary financial figures – revenue expenditure and capital expenditure
- Earmarked reserves
- Cost and savings tracker
- Performance management – how measured & monitored throughout the year
- Telephony performance

The conclusion to the review of this area was as follows:

Action	Commentary
An analysis of the current level of vacancies, and the costs of these posts if they are filled should be produced	Work in progress - Delivery Plan 2022-24 B1
Service areas to continue to ensure performance data and intelligence is used in improvements to service delivery for customers	Part of quarterly performance reporting, and monitoring undertaken by officers in support of this data
The councils should continue to monitor the annual revenue and capital expenditure figures to monitor expenditure trends, as this will help demonstrate whether the collaboration delivers real long term cost reductions	**Recommendation 11**
The one-off transition costs should clearly be shown in all One Team savings calculations going forwards	**Recommendation 12**
Senior officers should ensure they sample check the telephony performance by regularly carrying out mystery shopping calls	**Recommendation 13**

Customer Engagement

The strategic ambition for customer engagement was through the following focus areas:

- Better use of technology – to improve customer service, whilst reducing cost and improvement efficiencies – ICT / Digital opportunities such as CRM and communication channels

- Business improvement – to ensure we can continue to deliver, in the most efficient way, those service our customers value the most
- Shared approach to data, customer insight and experience – to enhance our understanding about the customer, based on their behaviour, experiences, needs or desires and using this insight to design services

The working group saw the significant progress that has been made in the above three categories and had outlined some key case studies of how service delivery has evolved positively.

The group also focussed on channels of communication, with a particular focus on telephony.

The group were also encouraged to see the following overview of success to date:

- Increased partnership engagement
- Resilient housing team
- Specialist officers
- Aligned County offer for Test & Trace payment
- National & regional influence
- System transformation programme
- Increased knowledge base of team
- Aligned council tax assistance policy
- Improved electronic channels of communication
- Joint website delivered

The conclusion to the review of this area was as follows:

Action	Commentary
To continue to gather insight across our communication channels through the expansion of our customer satisfaction survey, acting on customer feedback as part of our continual improvement approach to build a First-Class Customer Service for our customers	Work in progress - Delivery Plan 2022-24 F1, MT5 and MT11
To ensure that services are designed around our customers' needs and that they can access services through multiple channels, at time convenient to them	Work in progress - Delivery Plan 2022-24 F1, MT3, MT5 and MT11
Invest in our business intelligence approach to enable us to better understand the service we provide our customers and continually improve	Work in progress - Delivery Plan 2022-24 G2, MT11 and MT17
To continue to increase our digital offer to customers, so that those that are able to self-serve can 24 hours a day, which enables us to target a face-to-face resource to those that need it most	Work in progress - Delivery Plan 2022-24 F1, MT3, MT5 and MT11

To assess our customer service operating model and consider whether the current model is appropriate for the future vision of First-Class Customer Service through our First-Class Customer Service Programme	Work in progress - Delivery Plan 2022-24 F1, F3 andMT11
Continue to utilise our increased One Team footprint to influence local and national policy to make sure our resident's best interest is kept at the forefront	Work in progress - Delivery Plan 2022-24 F1 and F3

Background Papers are available in the Member Area for each of the aforementioned areas including the presentation and the final report.

Review of Collaboration – Member Working Group

Purpose

In line with the constitution – 16.15 Working Groups – the Portfolio Holder for Transformation and Organisational Development has convened this working group to review the collaboration agreement in place between Broadland District Council and South Norfolk Council.

The Member Working Group shall review the key aims of the Feasibility Study and the Section 113 agreement which was put in place to ensure the collaboration between the two Councils was effective and efficient in its undertakings. The working group will review:

a. The cost effectiveness of the collaboration in relation to the cost and savings tracker
b. The quarterly performance reports and associated service delivery to determine areas of focus
c. the section 113 itself
d. ~~identify ways of working together through a combination of sharing and closer integration of services in order to develop and enhance service delivery, build resilience and achieve future efficiencies~~
   Identify and fully understand the leadership and management structure and the roles and responsibilities of the previously autonomous sovereign independent councils, and their new R&Rs required to deliver collaboration /joined-up working based on the "one team " management structure. How has this impacted on BDCs service delivery, in terms of member functions internal committee work and most importantly our communities' organisations, residents, businesses and staff.
e. the progress in relation to the review of the constitution
f. the culture of the organisation and make any recommendations as required

In line with the working group being time limited the outcomes from the terms of reference will aim to be reported by the end of April in order to be able to feed into the external peer review planned for April and May 2022.

Working Group Membership

The membership and political balance of the working group is to be agreed by the Portfolio Holder, on the understanding that as a minimum political balance shall apply.

The Working Group will consist of four Members of Broadland District Council, three from the Conservative Group and one from the Liberal Democrat Group.

The Portfolio Holder shall also be in attendance each time the Group is convened.

Substitutes shall be allowed, with confirmation of substitute name being confirmed by the Member providing the apology.

The Member Working Group shall elect a Chair and Vice Chair.

Other Members are able to provide comments and questions through their Group representatives and those political groups not represented on the working group are able to feed this in through the Chair.

Quorum

The quorum shall be four Members, including substitutes.

Procedures and protocol

In line with the constitution this working group shall:

a) Be time limited and have specific terms of reference agreed by the individual or body convening the group (the Portfolio Holder Transformation and Organisational Development)
b) Report regularly on their business to the individual or body convening the group (the Portfolio Holder Transformation and Organisational Development and onto the Service Improvement and Efficiency Committee, and onto Overview & Scrutiny and Cabinet as needed)
c) Be responsible for determining their own procedures
d) Always be advised by relevant officers who shall be entitled to attend all meetings of the group but who shall not be entitled to vote

Frequency of meetings

Every effort shall be made to convene meetings every two weeks and held In Person.

Voting

The Working Group will operate on a basis of reaching a consensus amongst Members.

The Chairman for the meeting has the discretion to conduct a vote either by show of hands or, if there is no dissent, by affirmation of the meeting.

If there are equal number of votes for and against, the Chairman of the meeting will have a second or casting vote.

Using intelligence to achieve a First-Class Customer Service

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Portfolio: Transformation and Organisational Development

Ward(s) Affected: All

Purpose of the Report:
The purpose of this report is to set out how the Council proposes to use data and intelligence to drive delivery of the ambitions set out in our Strategic Plan 2020 – 2024, and ultimately deliver a first-class customer service for our communities and businesses.

Recommendations:
1. Cabinet to recommend to Council the agreement of funding to establish a Business Intelligence Service as set out in section 4.7 of the report.
2. Cabinet to recommend to Council that funding for 2022/23 is drawn from the corporate contingency.
3. Cabinet to recommend to Council that funding for the Business Intelligence Service is built into the base budget from 2023/24.

1.   Summary

1.1   This report sets out how the Council proposes to use data and intelligence to drive delivery of the ambitions in our Strategic Plan 2020 – 2024, and ultimately deliver a first-class customer service for our communities and businesses.

2.   Background

2.1   The Council agreed in March 2020 to move forward with implementing the four-year Strategic Plan which sets out the vision and priorities of the Council.

2.2   At the heart of the **Strategic Plan 2020-2024**, is the vision for our place:

'Working together to create the best place for everyone, now and for future generations'

2.3   This vision is underpinned by the Council's strategic priorities:
- Growing the economy
- Supporting individuals and empowering communities
- Protecting and improving the natural and built environment, whilst maximising quality of life
- Moving with the times, working smartly and collaboratively

2.4   The first three of the strategic priorities outlined above are service driven ambitions. The last ambition sets a priority for how we will work in order to deliver the plan. As part of this, our key ambition for the two Councils is to use the best of technology, customer insight and the right resources to deliver value for money services for our customers.

2.5   How we said we would achieve this in our **Strategic Plan 2020-2024**:

- Continuously challenging ourselves to ensure we **utilise our resources in the best possible way** and seize opportunities as they arise
- Becoming **an agile, flexible and collaborative organisation**, working across traditional local government/organisational boundaries and driving and adapting quickly to the changing environment
- Continuously improving our customer service offerings to best meet our customers' needs, **using evidence and data to drive our services**
- Continuing to **use the best technology for the job in hand** and making best use of the opportunities that digital ways of working can bring. Alongside making our digital platforms easy to access
- **Investing in our team and technology** to develop a forward thinking and growth focussed organisation
- Trying out and **testing new approaches and ideas, using the best evidence that we have to inform our decisions** and sharing best practice

2.6   To date, we have embarked upon an ambitious transformation agenda, with improving and exceeding our customer expectations at the heart of our work. Over

the last couple of years and in context of Covid, the Council has delivered a range of successful projects aimed at improving customer experience:

- We have launched a new housing system, giving our customers more flexibility to choose their own home
- We delivered a single website and email address for the Councils, providing us with a platform for improving our digital services for customers
- We agreed a new Customer Charter and resources dedicated to customer insight, agreed by Members in July 2021
- We introduced a new customer satisfaction survey, helping us understand and act upon customer feedback to help us continuously improve our services in the future
- We implemented a single telephony system across both councils which allows us to have better understanding of our customer demand on our services
- We have implemented a range of projects to enhance our use of technology across the organisation e.g., Microsoft Office 365, underpinned by our **ICT & Digital Strategy**, agreed by Members in July 2021 (south Norfolk). This Strategy also sets out **one of the key pillars for success of delivering a first-class customer service being driving digital through greater use of data and intelligence**

2.7   We have the ambition to deliver a first-class customer service, but we know there is more we can do to drive us forward at pace and enable us to deliver this ambition more effectively. The recent work done by the Broadland Members Collaboration Working Group also identified using business intelligence as being critical to improving the services we provide to our customers.

2.8   As set out above, our Strategic Plan was clear that we would utilise evidence, data and the right technology to help us improve our services for customers. As part of the SPARK Transformation Programme and outlined in the Delivery Plan for 2022-24 (see reference MT17 of the Plan), Members have already agreed, as a priority, to deliver a transformational business intelligence programme of work. This is a key area we have identified we can do more, and the remainder of this report sets out the recommendations to Cabinet on how this can be achieved.

3.   Current position/findings

Context

3.1   Demand across the whole of the public sector is rising, with residents and businesses under pressure and needing growing support from local government; particularly in the recent context of Covid and the cost of living crisis. This demand is predicted to grow further over the coming years both nationally and locally, with an increase in population and growing older population. For context, Broadland and South Norfolk combined is predicted to see 19%[1] increase in the population by 2043.

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[1] ONS

3.2   Alongside this, we know that generally, customer expectation is also changing with more of a drive towards 'on demand' type services, providing services in a flexible way to suit different types of customer need and providing good quality services delivered in a timely and efficient way.

3.3   With this context, there is a need for us to effectively understand the needs of our customers better, including those who use, or will use, services and the key outcomes that need to be achieved. In order to do this, we must have good access to, understanding of and use of data and intelligence (termed 'Business Intelligence') to both inform our service delivery, and drive transformation of our services in the future. This will also help us to inform our future strategic and delivery plans for the Council in the coming years.

Our use of business intelligence

3.4   Intelligence and data is critical to the Council as it will help us to better manage demand, identify savings and make more accurate forecasts for the future both in terms of finance and performance. Business Intelligence can be used for both customer insight, but also operational insight, underpinning service delivery and effective use of resource:

Table 1 – business intelligence benefits

Customer Insight & Intelligence	Operational Insight & Intelligence
Understand the needs, wants and preferences of our customers and target services accordingly (e.g. government grants)	Enables monitoring of business activities (in real time if needed) to ensure we deploy our resources in the most effective way
Ability to make evidence-based decisions on service levels, locations and resources to meet customer demand	Helps to identify what is working, what might be inefficient and help inform continuous improvements in services delivered to our customers
Better support us with targeting our communications through greater awareness and understanding of the customer through the data we hold	Provides clear evidence for both strategic and operational decision making
Aids us to inform service changes based on customer trends (e.g. 'on demand' service)	Allows for openness and transparency of our data internally and externally

3.5   Other local authorities have made use of business intelligence in a variety of ways, below is an overview of examples from different Councils have what they have done using intelligence however it should be noted that in each case they will have gone through a process, with the right resource and over a period of time, to get the quality of their data right and held in a central location.

Having open and transparent data

- Cornwall Council has used data and intelligence to enable 'data driven councillors' – by providing access to real time data from Council services, allowing for Councillors to look at service performance, but also understand their local constituent's engagement with services by postcode

Using Data Analytics to predict trends

- London Borough of Barking and Dagenham have been exploring data and predictive analytics as part of their focus on improving preventative action. Through this, the borough is working to use predictive analytics to determine which households are at risk of becoming homeless before it happens

Bringing data sets together to provide new insights

- Suffolk County Council and local health services are using data to help create an integrated service to shift funding towards preventative work and away from costly reactive service and improve the culture and effectiveness of performance management. This has allowed them to diagnose problems in a system more easily such as why there are high numbers of people who have delayed transfers of care from hospitals to residential settings.

Using data to provide better reporting

- North Norfolk Council publish their performance against their strategic measures on their website to inform residents and customers of how effectively they are delivering. They currently do this through a product called InPhase which enables them to provide reports and visualisations both internally and externally. The technology we are proposing to use for the Business Intelligence Service will enable us to produce those types of report and visualisations and much more, but without the restrictions which come with using a third-party provider.

Current state

3.6   Across the Council, we hold, manage and maintain significant amounts of data about the services we provide. We have some services, or parts of services that use data to analyse, understand and improve their operational delivery. But we also have areas where we only use data to meet statutory or delivery plan/strategic reporting requirements.

3.7   **Framework** - At present, neither Council has a framework for how we plan to use, manage and store our data and intelligence. This means we do not have a consistent approach and are potentially missing out on opportunities to improve our use and analysis of intelligence.

3.8   **Storage** – Across the Council, we gather and store data in a range of disparate ways, from utilising existing tools linked to specific service systems, extracting data from systems and placing it into MSExcel Spreadsheets and sometime using paper forms. We know this approach has a range of associated issues such as; risk of data corruption (being copied from one place to another), data integrity and difficulties in retrieving previous data as there is no central storage repository or system.

3.9 **Using data and intelligence to inform services** – as we currently have no central data store or reporting system in place, extracting data and intelligence from our systems is time consuming across the organisation and often, hard to access. Each service area where a system is used, has its own methods of extracting data and intelligence, which is often stored in multiple places and in a range of formats. This makes it difficult for us to bring together different data sources from different services to help us identify customer trends and improved customer journeys.

3.10 **Using data and intelligence to understand our performance** – understanding and reporting on our performance as a council at present, is largely a manual process. Due to the challenges set out above, understanding our performance, which should be something we are able to do all the time, is often time consuming and difficult and draws on staff resources just to gather data. This is resource that could be better used to analyse the data and provide insight to help improve services for customers. Our longer-term ambition is to enable performance information to be accessed automatically (both internally and potentially externally) and made available at touch of a button.

3.11 **Skills and resources** – at present, whilst we have staff across the organisation who are responsible for producing data and some analysis, we do not have dedicated staff with the right skills who can provide deeper levels of insight and analysis.

3.12 As prioritised by Members in the Delivery Plan 2022-24, work has been underway, working in partnership with consultants, to explore the opportunities that business intelligence and data could bring to the organisation. This exploratory work has been to date, funded through the Covid budget. This work has included delivering a 'pilot' project based on our telephony system and utilising an analysis and visualisation tool from Microsoft called 'PowerBI'. PowerBI allows the organisation to visualise the data we hold, connect different data sets and bring the data to life. The purpose of the pilot was to explore whether we were able to bring our data into a single storage point, transform and visualise data using an in-house solution and a view to the resources and costs to deliver a service for business intelligence. This pilot has been successful and has given us:

- A greater understanding of customer contact e.g. successful calls, abandonment rates, wait times, average call times, call types. This will allow us to be able to manage our service resource more effectively.
- The ability to identify trends in our customer contact behaviour e.g. peak call times, by day or by hour. This will allow us to make sure we have the right resource at the right time for our customers.
- The ability to predict future customer behaviour to anticipate changing demand on services.
- The ability to focus on the analysis – by providing the data automatically, it has enabled services to focus resource and effort on insight and analysis, to improve services and better manage resource.

3.13   Alongside the above pilot on telephony, we also conducted some initial work looking at housing and homelessness data. Even at an early stage, this provided insights which we would not have identified in a normal course of events (e.g., it allowed us to visualise those on the housing list by geographic location and their most recent application date).

3.14   The pilot as set out above provided the assurance, knowledge and evidence that the proposed model for business intelligence is the right approach for the Council moving forward.

<u>Strategic drivers for change</u>

3.15   **Service delivery for customers** – as demand for services is changing, it is even more important for us to understand this demand in more detail and make sure we are able to ask the right questions to improve our service offering. It is key we are able to not only use data and intelligence to understand 'what has happened' but also to understand 'why is it happening, what could we do differently, what happens if we change xyz' and predict what might happen in the future.

3.16   **Wider context** – local government has faced a sustained reduction in the funding from Central Government over the last few years, with district councils having taken the hardest financial hit[2], with districts seeing a 35% reduction in the overall real terms spending power between 2010-11 and 2020-21. Broadland and South Norfolk Councils, like many local Authorities, continue to operate in a climate of financial uncertainty with increasing demands on services alongside unpredictable future changes to government funding, from the potential changes to the Business Rates Retention Scheme and the Fair Funding Review, as well as a lack of clarity around the New Homes Bonus funding. This context provides the Council with the need to continuously review our service delivery models to ensure they remain efficient, effective and relevant to our customers. Key to this will be the data, intelligence and insight we use to inform the decisions we make in the future.

3.17   **Open and Transparent Services** – both Central Government and the LGA are promoting the increasing need for local government to release open data, enabling data and insight to be used more meaningfully to engage with the public and other public services. Recently, the Levelling Up White Paper also announced Governments move towards establishing a new independent body in England focussed on data, as well as a new Spatial Data Unit, aiming to empower citizens with information about their local area and drive data transformation.

4.   Proposed action

4.1   In order for us to take advantage of the benefits that intelligence and data could give to use to improve our customer offering, it is critical that we invest in the right resources and technology. To enable us to do this, it is recommended that we invest in establishing a new Business Intelligence Service, alongside the proposed technology required. The proposal for this is outlined below.

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[2] [Analysis by the Institute for Fiscal Studies](#)

<u>Business Intelligence Service</u>

4.2   We are proposing to establish a new Business Intelligence Service across the organisation. As set out above, this is something we do not currently have within our existing resources. A business intelligence service will enable the organisation to deploy, manage and use business intelligence tools and technology to improve customer services.

4.3   Below is an overview of what the new service would be doing:
- Provide a secure repository of 'clean' data which becomes a trusted and consistent reference point for reporting, trend analysis, planning, decision making and cost/benefit analysis.
- Automate reporting to reduce time spent on resource intensive, manual data gathering will release capacity to focus on high value performance and data analysis.
- Produce, up to date, dashboards which provide key performance data, at the touch of a button, right across the organisation. This can be both internally (team leader through to senior leaders) and eventually externally (members and residents)
- Provide a tool for innovative analysis of service data and releases existing resource time to carry new insights which identify areas for improvement, savings, revenue generation and inform decision making.
- Facilitate cross organisational data analysis and open opportunities for wider data sharing with other organisations in a secure and controlled way.
- Provides a basis for many intelligent technologies which we may want to consider that will support service transformation.
- Supports compliance with data retention legislation and provides an auditable repository for data. Provides consistency of data and data governance protection
- Embeds specialist skills within the One Team and standardises reporting functionality which will enable us to build a cohort of Power BI expertise removing the risk of a single point of failure.
- Delivers a flexible, scalable 'in house' solution over which we have the control to amend, change, develop without incurring further costs
- Currently services spend considerable time running both regular and ad-hoc reports to meet reporting requirements and requests for information. We anticipate that moving to this approach will release capacity that can be redeployed onto analysis that we help us understand how best to deliver services to customers in the most effective and efficient way and to drive continuous service improvement.

<u>Technology to enable the service</u>

4.4   The 'pilot' established that the best approach for us is to develop our business intelligence model 'in-house' using tried and tested tools from the **Microsoft suite** of services (Microsoft Azure and Microsoft PowerBI). This enables us to build our central data storage at a pace which is suited for the organisation. Whilst these tools are already available and used by the Council, to deliver the proposed

business intelligence model, we need to increase the capacity and usage of the tools, which will require investment for the Council (see table x below).

<u>Resources to enable the service</u>

4.5   We anticipate that the Business Intelligence Service will need specialist resource to ensure that the service is correctly managed, governed and has sufficient resource to deliver and maintain a range of services across the organisation. The table below shows the key roles, where they will sit in the structure and includes a brief overview of the responsibilities and connections with existing roles.
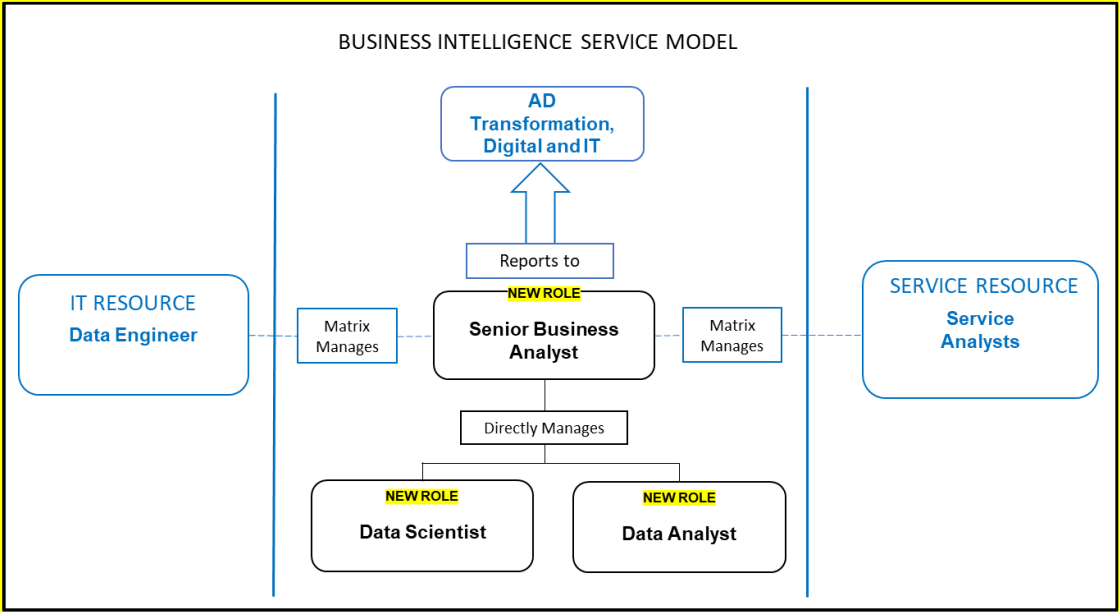
Senior Business Analyst – Responsible for governance of the Business Intelligence Service. Responsible for interpreting data to provide insight and analysis to the organisation. Line management and matrix management responsibilities for the team

Data Scientist – Responsible for modelling and transforming data to create an information resource for the Data Analysts

Data Analyst – Responsible for interpreting data to provide insight and analysis to the organisation

<u>Costs of service</u>

4.5   The costs of operating a Business Intelligence Service which can support and serve the needs and requirements of the whole organisation are set out in table below in paragraph **4.7**

4.6   This is breaks down between the costs for technical products and cost for the resources and consultancy.

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4.7   We know that Data Analysts and Data Scientists are highly sought after and can be difficult to recruit in the marketplace. The resources budget we are asking for gives us the flexibility to tailor our approach to as required. This could be though substantive recruitment, by growing our own skills through graduate apprenticeships, buying in specialist consultancy as needed or a mixture of all of these approaches.

Business Intelligence Service (costs are based on 22/23 prices)	Budget Required (£)				
	2022/23	**2023/24**	**2024/25**	**2025/26**	**2026/27**
Technical Costs	0	12,868	15,146	19,861	19,861
Resource & Consultancy Costs (on-costs included where relevant)	45,281	121,241	171,910	166,910	166,910
Totals (combined)	45,281	134,109	187,056	186,771	186,771
(45/55 applied) BDC	20,376	60,349	84,175	84,047	84,047
SNC	24,905	73,760	102,881	102,724	102,724

Next steps

4.8   Following agreement to fund a new business intelligence service for the organisation, there are some key activities which will take place as set out below:

- Recruit to the roles required and enable the technology in the most cost-effective way, to deliver the service as outlined in section 4.5
- Begin a phased roll out of the business intelligence model across the organisation – this will be done by bringing operational data into a central data store on a service-by-service basis
- Work with services to start using their data and intelligence to drive improvements to services for customers
- Design and develop a new open and transparent approach to providing our strategic performance data on our website

5.   Other options

5.1   There is an option to continue as we are currently and not investing in a new intelligence service and operating model. However, this would come at the risk of not being able to fully achieve our ambitions of driving a first-class customer service. We would continue to have a less effective and efficient way of utilising intelligence for the customer and service improvement. The desire from service areas for data insight and analysis will continue to grow nevertheless and if we cannot provide this as a service within the One Team then we will need to buy in services. Recently one of our services areas purchased a 12month contract for a specialist data analysis and insight service at a cost of £40K per annum.

6.   Issues and risks

6.1   **Resource Implications** – The proposals listed in section 4 above outline the costed model for delivering a Business Intelligence Service to achieve a first-class customer service offering. These proposals include the funding required to deliver this model and will be an increase to the existing budget for the Council.

6.2   **Legal Implications** – None applicable to this report.

6.3   **Equality Implications** – None applicable to this report.

6.4   **Environmental Impact** – None applicable to this report.

6.5   **Crime and Disorder** – None applicable to this report.

6.6   **Risks** – None applicable to this report.

7.   **Conclusion**

7.1   In summary, this report has set out how the Council proposes to use data and intelligence to drive delivery of our ambitions in our Strategic Plan 2020 – 2024, and ultimately deliver a first-class customer service for our communities and businesses. As demand changes, expectations grow and the context we are working in evolves, it is ever more important that we are able to efficiency and effectively access, manage, maintain and use our data and intelligence as an asset, to improve our customer offering.

7.2

8.   **Recommendations**

1. Cabinet to recommend to Council the agreement of funding to establish a Business Intelligence Service as set out in section 4.7 of the report.
2. Cabinet to recommend to Council that funding for 2022/23 is drawn from the corporate contingency.
3. Cabinet to recommend to Council that funding for the Business Intelligence Service is built into the base budget from 2023/24.

Background papers

Strategic Plan 2020-2024

Delivery Plan 2022 – 2024

ICT & Digital Strategy

Pages 38 to 78 are not available to the public because the information is confidential as it includes exempt information about the financial or business affairs of a person